



## CITY OF LODI COUNCIL COMMUNICATION

**AGENDA TITLE:** Approve Lodi Tourism Business Improvement District 2006 annual report, adopt resolution of intent to levy annual assessment and set public hearing for March 29, 2006

**MEETING DATE:** March 15, 2006

**PREPARED BY:** Management Analyst, City Manager's Office

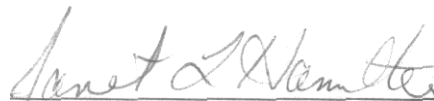
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**RECOMMENDED ACTION:** Council action will be threefold: (1) To approve the Lodi Tourism Business Improvement District (LTBID) 2006 Annual Report as submitted by the LTBID Board of Directors, (2) To adopt a Resolution of Intent to levy an annual assessment for that fiscal year, and (3) To set a public hearing for March 29, 2006 to consider the levy of the proposed assessment.

**BACKGROUND INFORMATION:** Pursuant to Lodi Municipal Code Chapter 12.07 and Streets and Highways Code Section 36500 et seq., the LTBID membership Board is required to present an Annual Report (Exhibit A) for City Council's review and approval. This must be done prior to the public hearing and adoption of a Resolution confirming the 2006 Annual Report and levy of assessment. The City collects an administrative fee of five percent from the LTBID assessment. Representatives of the LTBID will be present and will make a presentation regarding the attached report. The levy of the annual assessment will be discussed at the March 29<sup>th</sup> meeting.

### FISCAL IMPACT

  
\_\_\_\_\_  
Ruby Paine, Interim Finance Director

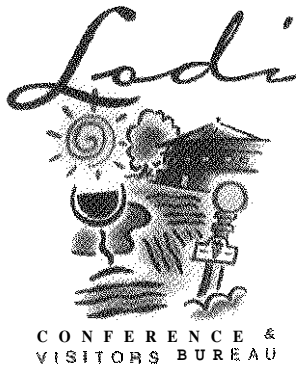
  
\_\_\_\_\_  
Janet L. Hamilton  
Management Analyst

Attachments

cc: Nancy Beckman, LTBID Executive Director

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APPROVED:   
\_\_\_\_\_  
Blair King, City Manager



March 7, 2006

Susan Blackston  
City Clerk  
City of Lodi  
221 W. Pine St.  
Lodi, CA 95240

Dear Ms. Blackston,

Attached is the 2006 Annual Report for the Lodi Tourism Business Improvement District (LTBID) which was established October 6, 2004 by City Ordinance 1753 and amended February 16, 2005 by Resolution No. 2005-37.

Attached you will find a 2006 work plan, budget, and method of assessment, as required by the California Streets and Highways Code #33650. Please note there are no suggested changes to the District at this time.

I plan to present the work plan in its entirety at the March 15<sup>th</sup> City Council meeting. Please feel free to call me with any questions you may have.

Sincerely,

Nancy Beckman  
Executive Director

## Lodi Tourism Business Improvement District

**Method of Assessment:** The LTBD includes hotels/lodging facilities within the city of Lodi. Each lodging facility within the district shall be assessed 3% of the gross room rental revenue. Rentals (stays) lasting over 30 days are not subject to the assessment. The assessment is levied on an annual basis and collected quarterly.

**Assessment Funding Purpose:** To administer marketing programs to promote Lodi as a tourism destination and to fund projects, programs, and activities that benefit hotels within the city of Lodi.

### 2006 Work Plan Exhibit A)

For the purpose of the Annual Report presentation, we have broken our 2006 work plan into 4 project areas:

- Marketing
- Press & Media Relations
- Customer Service & Hospitality
- Advocacy/Other

### 2006 LTBD Budget

Program Areas	Description	Budget
2006 Revenues:		
BID Assessment		\$165,000.00
City of Lodi		\$123,500.00
Donation		\$9,000.00
<b>Total Projected Revenues</b>		<b>\$297,500.00</b>
2006 Expenditures By Program Area:		
Marketing	Advertising, Tradeshow, Direct Mail, Solicitation, FAM Tours	\$184,957.00
Press & Media Relations	Bi-Annual Press Trips, Media Day	\$28,442.00
Customer Service & Hospitality	Visitor Info Mailings, Website, Visitor Publications, Hotel Brochure Distribution	\$70,486.00
Advocacy/Other	Advocacy, Newsletter	\$13,615.00
<b>Total Projected Expenses</b>		<b>\$297,500.00</b>
2006 Projected Net Carryover		\$0.00
2005 Net Carryover	Retained for construction costs at new office location	\$37,727.70

# **Lodi Conference & Visitors Bureau 2006 Work Plan**

## Marketing/Promotion Activities

### **Leisure Market**

Targeted Advertising: In addition to the Annual California Visitor Guide ad and bi-annual ads in the Sacramento Visitor Guide, monthly advertisements will be placed in Diablo and Sacramento Magazines. All advertising will include a response measure for tracking purposes and all advertisements in the Sacramento/Bay Area will be coordinated with a direct mail campaign.

Direct Mail Campaign: Quarterly marketing flyers will be mailed to **individuals** from our database that fall within the targeted magazine advertisement distribution areas.

Trade Shows: LCVB staff will attend two travel trade shows (Bay Area and Sunset Travel Shows) geared toward the leisure travel market. Whenever possible, additional representatives from the Lodi area will attend. All leads will be tracked and a database of contacts will be maintained for future marketing opportunities.

Taste of Lodi: The LCVB in conjunction with Wine & Roses and Jewel Winery will produce this annual signature event to: 1.) Draw in visitors and 2.) Showcase and market Lodi as a wine country tourism destination.

LodiView: Continue offering LodiView as a monthly e-publication highlighting events and activities of interest to the tourist. A goal will be to increase distribution by 15%.

### **Group Market**

Tradeshows: The Lodi Conference & Visitors Bureau will attend three trade/sales shows created for the group market: The California Society of Association Executives (Cal SAE), the National Tour Operator Travel & Tourism Exchange and the California Travel Industry California Travel Market appointment show. All sales leads will be followed up on and added to our database for future marketing opportunities.

Fam Tours: The Lodi CVB will host a minimum of three tours to group sales leaders to familiarize them with Lodi as a tourism destination.

Direct Mail Campaign: Quarterly fliers/**brochures** will be mailed to group sales decision makers to reinforce the Lodi tourism message.

Sponsorships: Sponsorships at tradeshow will be utilized (as appropriate and as funding allows) as a method by which to introduce the group market to Lodi as a destination

### **Press and Media Relations**

Press Trips: Two group press trips will be held each year as a way *to increase* PR for Lodi as a tourism destination. Travel writers for tourism trade publications, lifestyle magazines and newspapers will be the focus.

Media Day: The LCVB will hold an annual Media Day designed to build and strengthen television media relations while educating the media with regards to Lodi as a tourism destination.

### **Customer Service/Hospitality**

Visitor Information Packets: Visitor information will be distributed on request to individuals or groups. In 2006, an estimated 1800 requests for information will be filled.

Website: The visitlodi.com website will be maintained and updated as necessary. The goal of the website is twofold: 1.) To educate and create awareness of Lodi as a visitor destination and to 2.) Provide the highest degree of customer service by ensuring that visitor information is complete, up-to-date and easily accessible.

Visitor Publications: The LCVB will develop and maintain a number of publications geared to increase availability of visitor information.

- **Community Book:** 6,000 copies of the Community Book (Visitor Guide) will be distributed in 2006. The book which is designed to showcase Lodi to potential visitors and tourists is currently distributed to hotels/wineries and other tourist attractions. It is the main marketing piece for the LCVB and is mailed upon request and distributed at travel trade shows. The book has an estimated 18 month shelf-life.
- **Festival & Events Calendar:** The LCVB will produce and distribute a minimum of 1,500 Festival & Events Calendars. The calendar, produced annually, is a quick reference to events in the Lodi area and is distributed at the hotels, tradeshow, and in visitor information packets.
- **Visitor Attraction Map & Guide:** In 2006 the Lodi CVB will produce a Visitor Attraction Map & Guide. The map will come in a "pad", and will be distributed to hotels and other attractions to utilize when visitors are

looking for directions to attractions. The map will be designed to fold into a brochure so that it can be used in a card rack or as a self-mailer.

- **Meeting Facilities Brochure:** Produced in-house, the Meeting Facilities Brochure is designed to provide information to potential consumers on event facilities.

Hotel Brochure Distribution: LCVB staff will provide a monthly brochure distribution service to Lodi hotels. The goal is to ensure that visitor information is widely available and easily accessible to guests.

### Advocacy/Other Services

Advocacy: The Lodi Conference & Visitors Bureau desires to support the local lodging industry as well as other hospitality/tourism venues and organizations. Advocacy on tourism related issues are at the discretion of the Board of Directors.

Newsletter: A minimum of three newsletters will be distributed to local constituents and individuals vested in the tourism industry as a way to inform the public as to the programs and services undertaken by the Conference & Visitors Bureau.

RESOLUTION NO. 2006-43

A RESOLUTION OF THE LODI CITY COUNCIL APPROVING THE  
LODI TOURISM BUSINESS IMPROVEMENT DISTRICT 2006 ANNUAL  
REPORT; DECLARING ITS INTENTION TO LEVY ANNUAL  
ASSESSMENT, AND ESTABLISHING PUBLIC HEARING DATE

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WHEREAS, the Lodi Tourism Business Improvement District was established October 20, 2004, by Council adoption of Ordinance No. 1753, and as amended by Ordinance 1756; and

WHEREAS, the Annual Report as required by Streets and Highways Code §36500 et seq., has been submitted to the Council by the Board of Directors of said improvement area.

NOW, THEREFORE, the City Council of the City of Lodi does hereby resolve, determine, and find as follows:

1. The 2006 Annual Report is hereby received and approved as submitted, said Report being on file in the City Clerk's Office.
2. Establishes March 29, 2006, in the City Council Chambers, at Carnegie Forum, 305 West Pine Street, Lodi, California, at 600 p.m., or as soon thereafter as possible, as the date, place, and time to hold the public hearing required by Streets and Highway Code §36534.
3. It is the intention of the City Council to levy and collect assessments within the Lodi Tourism Business Improvement District for calendar year 2006 (the Area's fiscal year).
4. The proceeds from the Lodi Tourism Business Improvement District assessment shall be used to administer marketing programs to promote the City of Lodi as a tourism destination and to fund projects, programs, and activities that benefit hotels within the City of Lodi. The boundaries of the Lodi Tourism Business Improvement District shall be the boundaries of the City of Lodi. Refer to the Report on file in the Lodi City Clerk's office for a full and detailed description of the improvements and activities, boundaries, and proposed assessments for the 2006 fiscal year.
5. At the time of the public hearing, written and oral protests may be made. The form and manner of protests shall comply with Streets and Highways Code 5536524 and 36525.

Dated: March 15, 2006

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I hereby certify that Resolution No. 2006-43 was passed and adopted by the City Council of the City of Lodi in a regular meeting held March 15, 2006, by the following vote:

AYES: COUNCIL MEMBERS – Hansen, Johnson, and Mounce  
NOES: COUNCIL MEMBERS – None  
ABSENT: COUNCIL MEMBERS – Mayor Hitchcock  
ABSTAIN: COUNCIL MEMBERS – Beckman

  
SUSAN J. BLACKSTON  
City Clerk



PROOF OF PUBLICATION

(2015.5 C.C.C.P.)

STATE OF CALIFORNIA

County of San Joaquin

I am a citizen of the United States and a resident of the County aforesaid: I am over the age of ~~eighteen years and not a party to or interested in the above entitled matter.~~ I am the principal clerk of the printer of the Lodi News-Sentinel, a newspaper of general circulation, printed and published daily except Sundays and holidays, in the City of Lodi, California, County of San Joaquin and which newspaper had been adjudicated a newspaper of general circulation by the Superior Court, Department 3, of the County of San Joaquin, State of California, under the date of May 26th, 1953. Case Number 65990; that the notice of which the annexed is a printed copy (set in type not smaller than non-pareil) has been published in each regular and entire issue of said newspaper and not in any supplement thereto on the following dates to-wit:

March 21st

all in the year 2006.

I certify (or declare) under the penalty of perjury that the foregoing is true and correct.

Dated at Lodi, California, this 21st day of March 2006.

Signature

This space is for the County Clerk's Filing Stamp

Proof of Publication of  
Resolution No. 2006-43

A Resolution of the Lodi City Council Approving the Lodi Tourism Business Improvement District 2006 Annual Report; Declaring Its' Intention to Levy Annual Assessment, and establishing Public Hearing Date

NOTICE OF PUBLIC HEARING  
RESOLUTION NO 2006 43

A RESOLUTION OF THE LODI CITY COUNCIL APPROVING THE LODI TOURISM BUSINESS IMPROVEMENT DISTRICT 2006 ANNUAL REPORT, DECLARING ITS INTENTION TO LEVY ANNUAL ASSESSMENT, AND ESTABLISHING PUBLIC HEARING DATE

WHEREAS, the Lodi Tourism Business Improvement District was established October 20, 2004, by Council adoption of Ordinance No. 1753, and as amended by Ordinance 1756; and

WHEREAS, the Annual Report as required by Streets and Highways Code §36500 et seq., has been submitted to the Council by the Board of Directors of said improvement area.

NOW, THEREFORE, the City Council of the City of Lodi does hereby resolve, determine, and find as follows:

1. The 2006 Annual Report is hereby received and approved as submitted, said Report being on file in the City Clerk's Office

2. Establishes March 29, 2006, in the City Council Chambers, at Carnegie Forum, 305 West Pine Street, Lodi, California, at 6:00 p.m., or as soon thereafter as possible, as the date, place, and time to hold the public hearing required by Streets and Highway Code §36534.

3. It is the intention of the City Council to levy and collect assessments within the Lodi Tourism Business Improvement District for calendar year 2006 (the Area's fiscal year).

4. The proceeds from the Lodi Tourism Business Improvement District assessment shall be used to administer marketing program to promote the City of Lodi as tourism destination and to fund projects, programs, and activities that benefit hotels within the City of Lodi. The boundaries of the Lodi Tourism Business Improvement District shall be the boundaries of the City of Lodi. Refer to the Report on file in the Lodi City Clerk's office for a full and detailed description of the improvements and activities boundaries, and propose assessments for the 2006 fiscal year.

5. At the time of the public hearing, written and oral protests may be made. The form and manner of protests shall comply with Streets and Highways Code §§36524 and 36525.

Dated March 15, 2006

I hereby certify that Resolution No. 2006-43 was passed and adopted by the City Council of the City of Lodi in a regular meeting held March 15, 2006, by the following vote:

AYES: COUNCIL MEMBERS - Hansen, Johnson, and Mounce

NOES: COUNCIL MEMBERS - None

ABSENT: COUNCIL MEMBERS - Mayor Hitchcock

ABSTAIN: COUNCIL MEMBERS - Beckman

SUSAN J. BLACKSTON  
City Clerk  
March 21, 2006 - 05511652

5511652



***Please immediately confirm receipt  
of this fax by calling 333-6702***

CITY OF LODI  
P. O. BOX 3006  
LODI, CALIFORNIA 95241-1910

**ADVERTISING INSTRUCTIONS**

**SUBJECT** NOTICE OF PUBLIC HEARING on March 29, 2006 to consider Lodi Tourism  
Business Improvement District levy of proposed assessment for fiscal year 2006 and  
cor of Annual Report.

**LEGAL AD**

**PUBLISH DATE:** March 18, 2006

**TEAR SHEETS WANTED:** Three (3) please

**SEND AFFIDAVIT AND BILL TO:** SUSAN BLACKSTON, CITY CLERK  
City of Lodi  
P.O. Box 3006  
Lodi, CA 95241-1910

**DATED:** March 16, 2006

**ORDERED BY:** SUSAN J. BLACKSTON  
CITY CLERK

JENNIFER M. PERRIN, CMC  
DEPUTY CITY CLERK

JACQUELINE L. TAYLOR, CMC  
DEPUTY CITY CLERK

  
DANA R. CHAPMAN  
ADMINISTRATIVE CLERK

**Verify Appearance of this Legal in the Newspaper – Copy to File**

Faxed to the Sentinel at 369-1084 at 11:00 AM (time) on 3/16/06 (date) 2 (pages)  
LNS DIANE Phoned to confirm receipt of all pages at 2:30p (time) JLT DRC JMP (initials)

## NOTICE OF PUBLIC HEARING

RESOLUTION NO. 2006-43

A RESOLUTION OF THE LODI CITY COUNCIL APPROVING THE  
LODI TOURISM BUSINESS IMPROVEMENT DISTRICT 2006 ANNUAL  
REPORT; DECLARING ITS' INTENTION TO LEVY ANNUAL  
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5. At the time of the public hearing, written and oral protests may be made. The form and manner of protests shall comply with Streets and Highways Code §§36524 and 36525.

Dated: March 15, 2006

=====

I hereby certify that Resolution No. 2006-43 was passed and adopted by the City Council of the City of Lodi in a regular meeting held March 15, 2006, by the following vote:

AYES: COUNCIL MEMBERS – Hansen, Johnson, and Mounce

NOES: COUNCIL MEMBERS – None

ABSENT: COUNCIL MEMBERS – Mayor Hitchcock

ABSTAIN: COUNCIL MEMBERS – Beckman



SUSAN J. BLACKSTON  
City Clerk



## **DECLARATION OF POSTING**

### **PUBLIC HEARING on March 29, 2006 to consider Lodi Tourism Business Improvement District levy of proposed assessment for fiscal year 2006 and confirmation of Annual Report**

On Friday March 17, 2006, in the City of Lodi, San Joaquin County, California, a Notice of Public Hearing to consider Lodi Tourism Business Improvement District **levy** of proposed assessment for fiscal year 2006 and confirmation of Annual **Report**.

Lodi Public Library  
Lodi City Clerk's Office  
Lodi City Hall Lobby  
Lodi Carnegie Forum

I declare under penalty of perjury that the foregoing **is** true and correct.

Executed on March 17, 2006, at Lodi, California.

ORDERED BY:

**SUSAN J. BLACKSTON**  
**CITY CLERK**

JENNIFER M. PERRIN, CMC  
DEPUTY CITY CLERK

JACQUELINE L. TAYLOR, CMC  
DEPUTY CITY CLERK

A handwritten signature in dark ink, appearing to read "Dana R. Chapman", is written over a horizontal line.

DANA R. CHAPMAN  
ADMINISTRATIVE CLERK



## **DECLARATION OF MAILING**

**PUBLIC HEARING on March 29, 2006 to consider Lodi Tourism Business Improvement District levy of proposed assessment for fiscal year 2006 and confirmation of Annual Report.**

On March 16, 2006, in the City of Lodi, San Joaquin County, California, I deposited in the United States mail, envelopes with first-class postage prepaid thereon, to consider Lodi Tourism Business Improvement District levy of proposed assessment for fiscal year 2006 and confirmation of Annual Report

There is a regular daily communication by mail between the City of Lodi, California, and the places to which said envelopes were addressed.

I declare under penalty of perjury that the foregoing is true and correct.

Executed on March 16, 2006, at Lodi, California.

ORDERED BY:

**SUSAN BLACKSTON  
CITY CLERK, CITY OF LODI**

ORDERED BY:

\_\_\_\_\_  
JENNIFER M. PERRIN, CMC  
DEPUTY CITY CLERK

\_\_\_\_\_  
JACQUELINE L. TAYLOR, CMC  
DEPUTY CITY CLERK

  
\_\_\_\_\_  
DA A R. CHAPMAN  
ADMINISTRATIVE CLERK

## **Lodi Tourism Business Improvement District Advisory Board**

### **Members:**

Tabitha Freytag  
Wine and ~~Roses~~ Country Inn  
2505 W. Turner Road  
Lodi, CA 95242  
(209)334-6988

Beth Kim  
Comfort Inn  
118 N. Cherokee Lane  
Lodi, CA 95240  
(709)367-4848

Sonny Patel  
Wine Country Inn  
607 S. Cherokee Lane  
Lodi, CA 95240  
(209)368-2707

Sunil Yadav  
Modern Motor Lodge  
1050 S. Cherokee Lane  
Lodi, CA 95240  
(209)333-8844

Mary Wallace  
Frames and Fine Things  
18 W. Pine Street  
Lodi, CA 95240  
(209)333-1246

Kelli Mettler  
Lodi Conference and Visitors Bureau  
2545 W. Turner Road  
Lodi, CA 95242  
(209)365-1195

Betty Hansen  
Jewel Fine Wines  
3750 E. Woodbridge Road  
Woodbridge, CA 95258  
(209)340-8521

### **Liaison:**

Jim Krueger, Finance Director  
City of Lodi  
P.O. Box 3006  
Lodi, CA 95241-1910  
(209)333-6761

### **Also mail agendas to:**

Nancy Beckman, Executive Director  
Lodi Conference and Visitors Bureau  
2545 W. Turner Road  
Lodi, CA 95240  
(209)365-1195

*one  
3/16/06  
Mailing list*